TMS medTester Sync Utility Installation & System Administrator Guide

AG080115

Welcome to the Guide

Welcome to the ***TMS medTester Sync Utility Installation and System Administrator Guide***. This document consists of two parts: installation and system administrator. Each part comes with its own table of contents and a list of individual topics. This document is not intended for the end user of TMS Mobile. For end user information, please consult the ***TMS User Guide***.

This document contains information from the ***TMS Administrator Guide***. If you would like more information on the TMS application and its other add-on modules, please consult the full ***TMS Administrator Guide***.

TMS medTester Sync Utility Installation Guide

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medTester Sync Utility

medTester System Requirements

You must have the following items from Fluke Biomedical in order to run the FRSoft medTester Sync Utility. If you don't have any of the items below, please contact Fluke Biomedical for pricing and to purchase these items. Fluke Biomedical's contact information is provided above. *FRSoft is not an authorized reseller of these items.*

- Ensure the medTester is compatible or upgrade the medTester so that it is compatible
- medTester 5000 C devices
- Firmware Revision 5.08 or higher running on the medTester devices
- Module #10 Competitive CMMS Interface

Additional System Requirements

In order for the **medTester Sync Utility** to perform optimally, your hardware and software must meet the minimum specifications posted on our Web site for TMS:

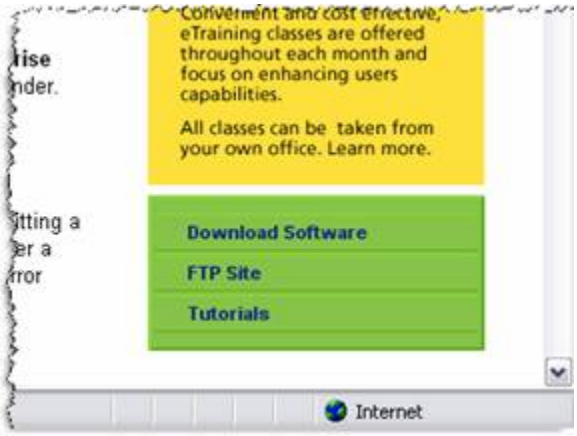
TMS Enterprise Requirements

Downloading TMS Software

The software you need to install TMS and its add-on modules is found on the **Customer Care Center**. Follow the steps below to locate and download the software.

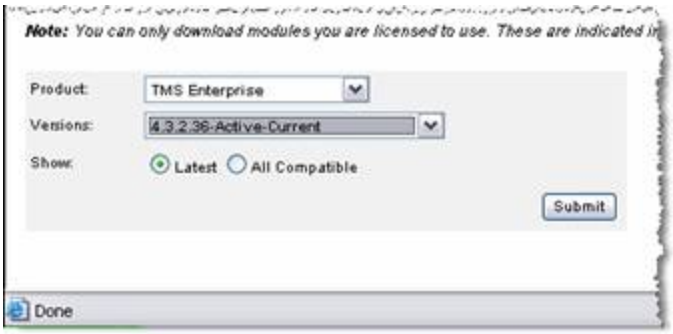
Note: *In the example below, we selected the TMS application software to download. The procedure is the same for downloading the install software for the add-on modules as well.*

1. Log in to the **Customer Care Center** (CCC).
2. In the bottom right-hand corner of the screen, you will see a **Download Software** link. Click the link.


eTraining classes are offered throughout each month and focus on enhancing users capabilities.
All classes can be taken from your own office. Learn more.
Download Software
FTP Site
Tutorials
Internet

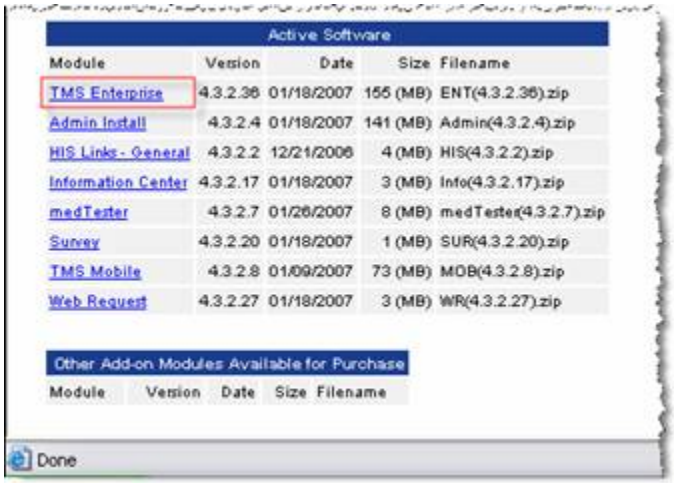
3. Scroll down to the **Product** and **Versions** dropdowns.

4. In the **Product** dropdown, select **TMS Enterprise**.
5. In the **Versions** dropdown, select the most current, active version, as indicated by the words **Active-Current** next to the version number.



6. Click the **Submit** button.

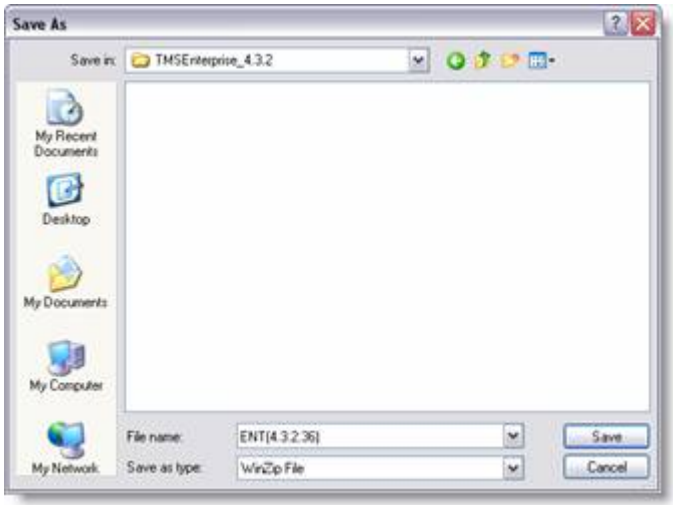
7. In the **Active Software** list, click on the link for the application or add-on module software you want to download.


Active Software
Module Version Date Size Filename
TMS Enterprise 4.3.2.36 01/18/2007 155 (MB) ENT(4.3.2.36).zip
Admin Install 4.3.2.4 01/18/2007 141 (MB) Admin(4.3.2.4).zip
HIS Links - General 4.3.2.2 12/21/2006 4 (MB) HIS(4.3.2.2).zip
Information Center 4.3.2.17 01/18/2007 3 (MB) Info(4.3.2.17).zip
medTester 4.3.2.7 01/26/2007 8 (MB) medTester(4.3.2.7).zip
Survey 4.3.2.20 01/18/2007 1 (MB) SUR(4.3.2.20).zip
TMS Mobile 4.3.2.8 01/09/2007 73 (MB) MOB(4.3.2.8).zip
Web Request 4.3.2.27 01/18/2007 3 (MB) WR(4.3.2.27).zip
Other Add-on Modules Available for Purchase
Module Version Date Size Filename
Done

8. Click **Save**.

File Download
Do you want to open or save this file?
Name: ENT(4.3.2.36).zip
Type: WinZip File, 154 MB
From: support.frsoft.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

9. Navigate to where you want to save the zip file and click **Save**.



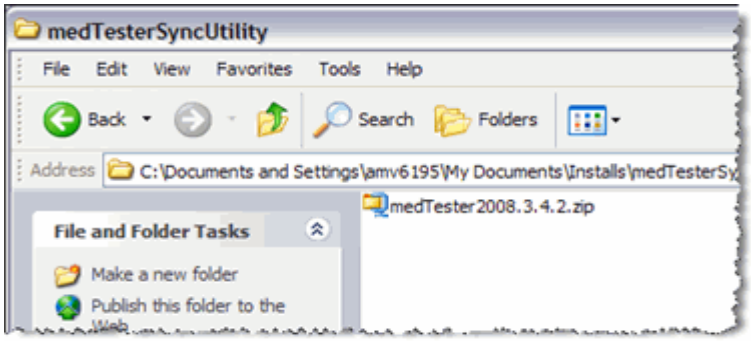
10. Proceed to the installation sections.

Installing the medTester Sync Utility

You should have already downloaded the **medTester Sync Utility** software from the **Customer Care Center**. If not, please see the ***Downloading TMS Software*** section above.

Note: *Always install add-on module software* ***after*** *you install the TMS application software.*

1. Browse to the location where you saved the zip file.



2. Double-click on the zip file to open it.
3. Double-click the **.msi** file to start the installation.

Note: *If you receive a* ***WinZip Caution*** *dialog box, click* ***Yes****.*

4. You are presented with the **Welcome to the TMS WorkGroup medTester Sync Utility Setup Wizard** screen. Click **Next**.

TMS Enterprise medTester Sync Utility
Welcome to the TMS Enterprise medTester Sync Utility Setup Wizard
The installer will guide you through the steps required to install TMS Enterprise medTester Sync Utility on your computer.
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
Cancel
< Back
Next >

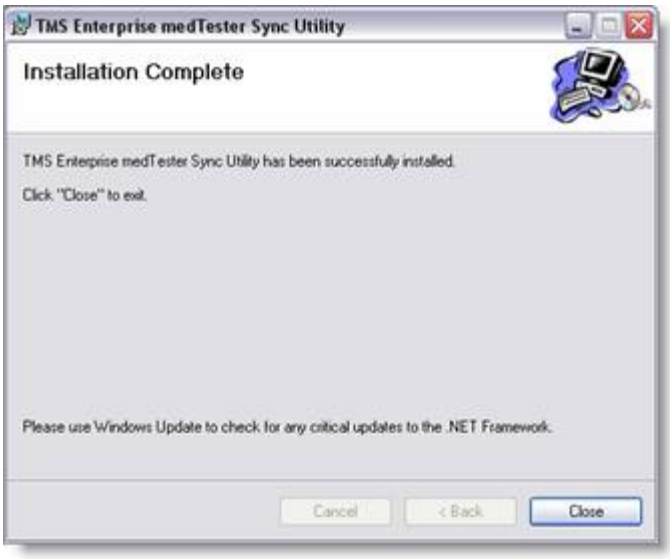
5. In the **Select Installation Folder** screen, click **Next** to accept the default installation folder. To install to a different folder, type the folder name in the **Folder** field or click **Browse** to search for a new location.

TMS Enterprise medTester Sync Utility
Select Installation Folder
The installer will install TMS Enterprise medTester Sync Utility to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\FRSoft\TMS Enterprise medTester Sync Utility\
Browse...
Disk Cost...
Cancel
< Back
Next >

6. Click **Next**.
7. Click **Next** to confirm the installation.

TMS Enterprise medTester Sync Utility
Confirm Installation
The installer is ready to install TMS Enterprise medTester Sync Utility on your computer.
Click "Next" to start the installation.
Cancel
< Back
Next >

8. Click **Close** to finish the installation.


TMS Enterprise medTester Sync Utility
Installation Complete
TMS Enterprise medTester Sync Utility has been successfully installed.
Click "Close" to exit.
Please use Windows Update to check for any critical updates to the .NET Framework.
Cancel
< Back
Close

TMS medTester Sync Utility
System Administrator Guide

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medTester Sync Utility

Introduction to the medTester Interface

FRSoft customers often use **Fluke Corporation's medTester®** in their clinical operations for automated electrical safety tests, PM checklists, and defibrillator testing. In the past, these customers would have to manually input the data into one of the TMS products (for example, TMS WorkGroup).
We designed the medTester Interface to electronically transfer data from the medTester device to one of the TMS products. This sync utility transfers information from TMS to the medTester and from the medTester to TMS.

A note about download and upload

The terms *upload* and *download* can be confusing because they require the perspective of only one side to establish context. For the purposes of this user guide we work from the assumption that medTester users view the world from the perspective of the medTester. This means that:

1. Checklists are *downloaded* from the TMS application to the medTester.
2. MUP files are *uploaded* to the TMS application from the medTester.

Upload and download are used this way in the sync utility and in the help file.

Note: *If you are looking for instructions on how to install and configure the medTester Sync Utility, please consult the* ***medTester Sync Utility Admin Guide*** *in PDF format. This guide is available with your software and on the FRSoft Customer Care Center (CCC).*

Fluke Biomedical

This documentation pertains to the FRSoft interface with the medTester. Please refer to medTester device documentation to operate the medTester supplied by Fluke Biomedical.

Fluke Biomedical on the Web: www.flukebiomedical.com

To contact Fluke Biomedical corporate offices by phone

Toll Free: 1-800-648-7952
Service/Repairs (U.S.): 1-800-265-7586

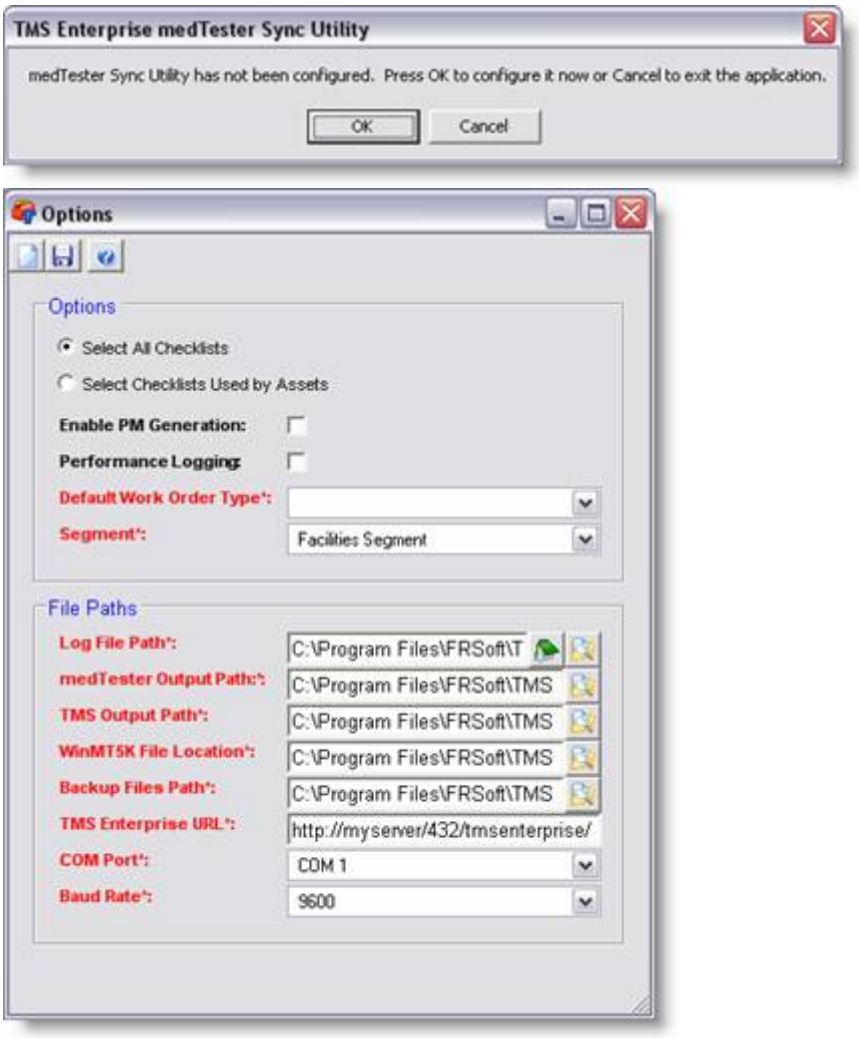
Configuring the medTester Sync Utility

1. Double-click the **TMS WorkGroup medTester Sync Utility** desktop shortcut icon.

2. In **Server** field, type in the name of your SQL server.

3. In the **Database** field, type in the name of your database.
4. Click **Next**.
5. In the **UserID** field, type in your SQL user ID.

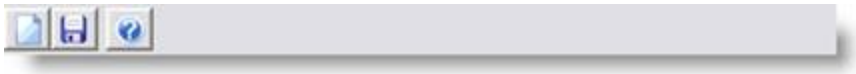
6. In the **Password** field, type in your password.
7. Click **Login**.
8. If this is the first time you are running the sync utility after you installed it, then you are presented with the popup box below. Click **OK**. You are presented with the **Options** screen.



The Options Screen

The Options toolbar

There are three buttons on the **Options** toolbar. From left to right they are: **New**, **Save**, and **Help**.



New clears all fields.
Save saves your medTester Sync Utility setup options.
Help launches the medTester Sync Utility Guide.

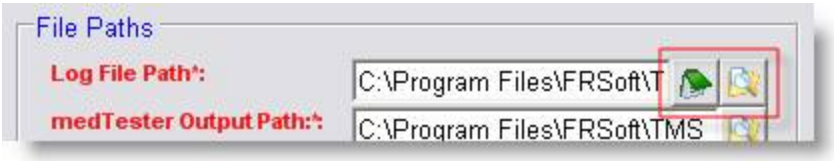
Options

By default, **Select All Checklists** is selected. You can also choose **Select Checklists Used by Assets** to transfer just the checklists for the assets that you are transferring.
Check the box next to **Enable PM Generation** to enable PM Generation. Check the box next to **Performance Logging** to use performance logging.
In the **Default Work Order Type** list, select the default work order type for work orders that are not generated by PM Generation. **Default Work Order Type** is a required field, as denoted by the **red bold** text.
In the **Segment** list, select the segment of your database. **Segment** is a required field. The segment selected here is the segment used when creating, updating, and querying work orders. The **Segment** list

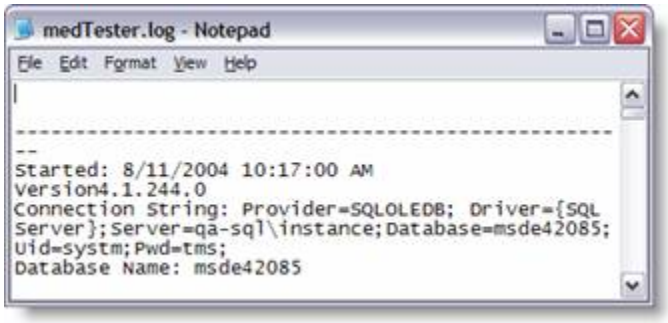
for the **Asset Query** screen only has the segment selected here, the shared segment, and the blank segment (both the shared segment and all segments you have access to) as options. This prevents you from using assets that aren't in the same segment that the work orders are created and updated in.
The selections you make in the **Options** section are saved and loaded by user. When you start the sync utility, it lets you know if all the required options are not set and displays the **Options** screen. The **Options** screen can also be accessed through the main menu.

File Paths

All of the fields in **File Paths** are required fields, denoted in **red bold** text.
The **Log File Path** is the file path that contains the **medTester.log** file. The default log file path is **C:\Program Files\FRSoft\TMS WorkGroup medTester Sync Utility**. There are two buttons next to the **Log File Path** field. From left to right, they are the **View Log File** button and the **Browse** button.



The **View Log File** button launches the **medTester.log** file in **Notepad**.



The **Browse** button launches the **Select a directory** window. You can change the **Log File Path** here.

The other file paths are:

- **medTester Output Path** - Click on the **Browse** button and click on the **medTester Output** folder.
- **TMS Output Path** - Click on the **Browse** button and click on the **TMS Output** folder.
- **WinMT5K File Location** - Click on the **Browse** button and click on the **WinMT5K** folder.
- **Backup Files Path** - Click on the **Browse** button and click on the **Backup** folder.
- **TMS Enterprise URL** - Enter the Web address of the TMS Enterprise application.
- **COM Port** - Select the COM port that the medTester is connected to.
- **Baud Rate** – Select a baud rate of 9600.

File Path options are saved in the local machine's registry.

Note: *The Options screen can be accesses through the main menu of the medTester Sync Utility. From the main menu, click Tools > Options.*

Once you have set the medTester Sync Utility options, close the window to start the medTester Sync Utility interface.

Setup In TMS

Setting up TMS to use the medTester

You need to do some initial setup within the TMS application to get ready to use the **medTester** interface. Setting up TMS to use the **medTester** application is a three-step process.

Step 1: Create a Checklist task.

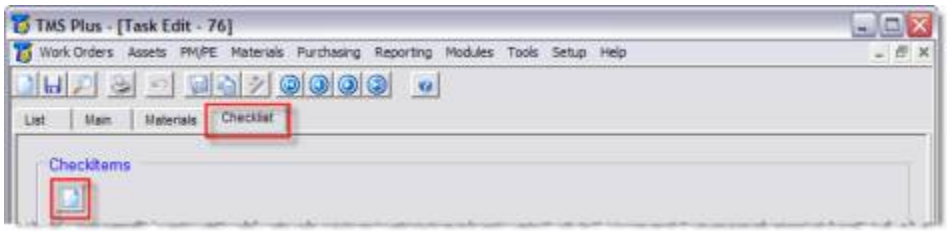
Step 2: Create an Asset with Checklist PMs.

Step 3: Create a PM with a Checklist task.

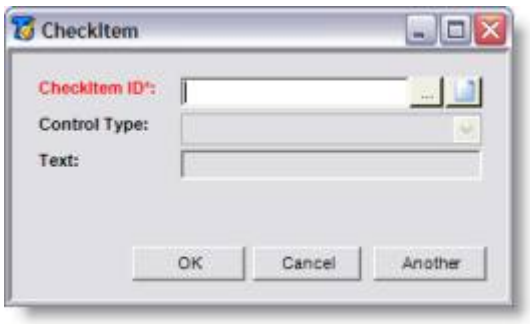
Create a Checklist task

1. Log in to the TMS application.
2. From the **Modules** menu, go to **Tasks** > **Task Create**.
3. In the **Description** field, type in a description of your new task. The description can't be more than 15 characters long.
4. In the **Segment** list, select your segment (not applicable to TMS WorkGroup users).
5. In the **Type** list, select the type of task.
6. In the **Skill** list, select the skill for your task.
7. Click the box next to **Checklist**.

8. Complete any other fields that are not required.
9. Click **Save**. The screen changes. You are presented with additional tabs.
10. Click the **Checklist** tab.
11. In the **Check Items** area, click **New**.


TMS Plus - [Task Edit - 76]
Work Orders Assets PM/PE Materials Purchasing Reporting Modules Tools Setup Help
List Main Materials Checklist
CheckItems

12. You are presented with the **CheckItem** popup box.

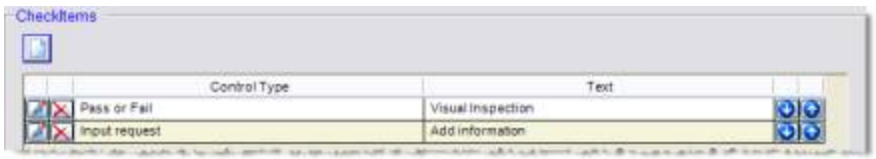


If you know the **CheckItem ID**, type in the **CheckItem ID**.

If you don't know the **CheckItem ID**, use the **Lookup** button (**...**)to find the **CheckItem ID**.

If you want to create a new **CheckItem ID**, click the **New** button.

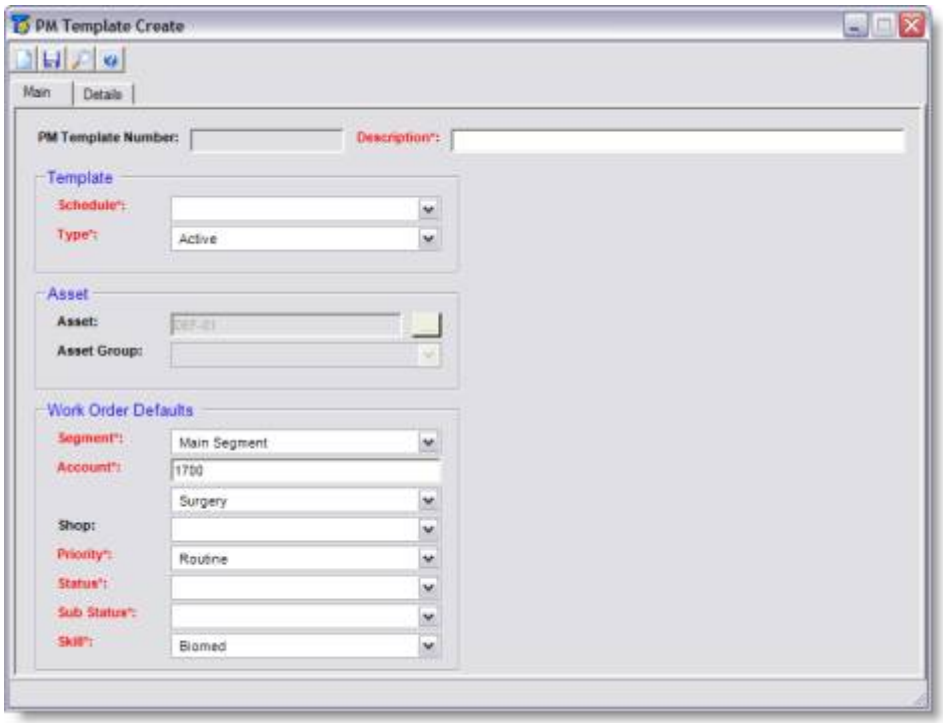
13. Click **OK**. Or, click **Another** to add an additional **CheckItem**. TMS adds your **CheckItems** to the grid.



14. Click **Save**.

Create a PM with a Checklist task

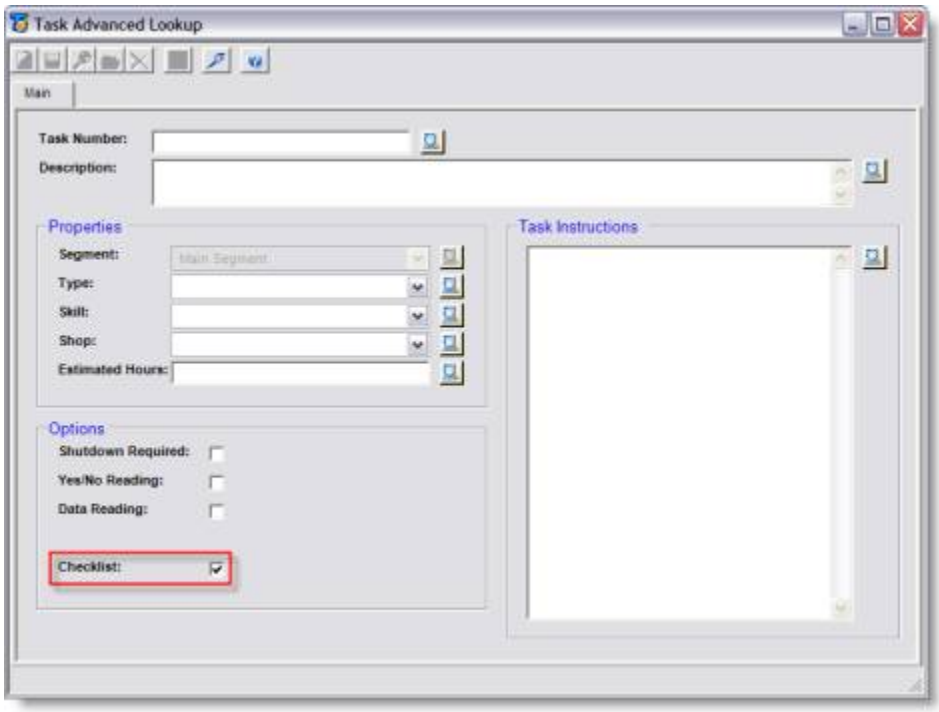
1. Retrieve the asset that you will be creating the PM for (from the **Assets** menu click **Asset Query** …).
2. Click the **PM Info** tab.
3. In the **PM Information** area, click **New**. You are presented with the **PM Template Create** screen.



4. Complete all of the required fields denoted in **red bold** text.
5. Click **Save**. You are presented with the **PM Template Edit** screen.
6. Click the **Tasks/Assignments** tab.
7. In the **Tasks** area, click **New**.

8. You are presented with the **PM Template Tasks** popup box.

9. Click the **Lookup** button (**…**). You are presented with the **Task Advanced Lookup** screen.
10. Click the box next to **Checklist**.



11. Click **Run Query**. From the list of records, double-click the task that you want to add to your PM Template. You are returned to the **PM Template Tasks** popup box. Notice that TMS completed the information in the popup box.

Note: *You can only have one* ***Checklist PM*** *per asset. Checklist tasks are available only if the* ***CheckList*** *box is checked on the* ***Task Advanced Lookup*** *screen.*

Create an Asset with a Checklist PM

Creating an asset for this process is exactly the same as creating any other asset that is entered into TMS. Please refer to the **Asset Create** topic for more information on how to enter an asset into TMS.

medTester Interface Business Rules

Active WO Test PASS WO Update

The **Work Order Description** remains unchanged.

The **Work Order Status** is **Completed**.

The **Work Order Sub Status** is **Changes Allowed**.

A time charge is added to the work order using the **Operator Initials** and time entered on the medTester by the operator.

Last Generated Date, **Last Completed Date**, and **Next Due Date** are updated on the PM template used to generate the work order according to the system options and PM template options at the time.

Not Active WO Test FAIL Update

The **Work Order Description** changes to **Failed PM Inspection**.

The **Work Order Status** remains **ACTIVE**.

A time charge is added to the work order using the **Operator Initials** and time entered on the medTester by the operator.

The **Work Order Sub Status** changes to **FAILPM**.

Work Order Create

The **Work Order Type** is set to the one selected in the **Setup** part of the **Sync Utility**.

The **Work Order Account** is set to the asset's **Account**.

The **Work Order Status** remains **ACTIVE**.

A time charge is added to the work order using the **Operator Initials** and time entered on the medTester by the operator.

In the iTMS version of the **Sync Utility**, the **Default Task** is added to the work order.

All other required fields for the work order are filled with the work order defaults configured in TMS or iTMS.

Test PASS WO Update

The **Work Order Description** is **Unscheduled Work Order**.

The **Work Order Status** is **Completed**.

The **Work Order Sub Status** is **Changes Allowed**.

Test FAIL WO Update

The **Work Order Description** is **Failed PM Inspection**.

The **Work Order Sub Status** is **FAILPM**.

Additional Help and Documentation Feedback

Support

You have several options for getting help with TMS. You can use the *TMS User Guide* (from the **Help** menu, click **Help**), contact TMS Technical Support, and view our **Customer Care Center** (**CCC**).

TMS Technical Support is at hand to assist you with questions and suggestions. When technical problems occur, TMS Technical Support works with you to resolve the problem in a timely manner. If given the appropriate security, TMS Technical Support can access your system and diagnose the problem - saving everyone time and effort. All support issues are logged and tracked so that we maintain the highest level of customer satisfaction.

The Customer Care Center (CCC)

Four Rivers maintains a comprehensive online support center for our customers called the Customer Care Center (http://support.frsoft.com/ccc/). The CCC contains TMS Product Family information and resources including documentation, tutorials, reports, software, and much more.

At the CCC, you can add support issues, check product information (system requirements, functionality matrix, and add-on products), update and view the support history of your organization, access training and tutorials, view and download documentation, search the TMS Knowledge Base, view common support issues and solutions, and download software.

Using your username and password, you can access the CCC at: http://support.frsoft.com/ccc/. If you don't know your username and password, please contact Technical Support.

Contact TMS Technical Support

Our normal business hours are Monday through Friday, 8:00 AM to 5:00 PM ET, excluding national holidays. Please see the **Before Calling TMS Technical Support** section below for helpful tips related to contacting TMS Technical Support.

Telephone: 1-800-864-0013

Fax: (412) 256-9040

Email: TechSupport@frsoft.com

CCC: Enter a support issue through the Customer Care Center.

Chat: Receive real-time help from a TMS Technical Support professional is available through the Customer Care Center (log into the **CCC**, click **Request Support > Chat with a Support Representative**) from 8:00 a.m. to 5:00 p.m. ET weekdays, excluding holidays. Chat is intended for quick questions, however, not advanced issues.

Knowledge Base

The Knowledge Base is designed to help our customers find answers to various questions and error codes. Search FRSoft's database of support articles. After you log in to the CCC, click the Knowledge Base link under Support.

Top Support Issues and Solutions

View frequently asked questions and most common support issues and solutions from the CCC. After you log in to the CCC, click the Top TMS Support Issues link under Support.

TMS WorkGroup
Top TMS Support Issues
Adobe Acrobat Reader Versions
Advanced Queries
Backing Up a TMS Database Through TMS Database Utilities
How to Find PM Work Orders
medTester MUP Table Could Not Be Completely Processed
Moving a TMS Database
Multiple PM Work Orders
Registry Keys

eTech Alerts

Four Rivers Software Systems developed the eTech Alert service to make our customers aware of problems that could affect their organization. After you login to the CCC, click the eTech Alert Archives link under Support.

Four Rivers
SOFTWARE SYSTEMS
HARNESSING THE POWER OF INFORMATION™
Four Rivers Software Systems Inc., the producer of the TMS Family of Products, would like to notify you of a problem that affects the TMS Family of Products.
Need More Help?
Log in to the Customer Care Center (CCC), FRSoft's comprehensive online support center for our customers.
FRSoft Technical Support is available between 8 a.m. and 5 p.m. ET,
TMS eTech Alert
Microsoft Windows Internet Explorer 7 and TMS Products
PROBLEM
Microsoft Windows Internet Explorer 7 is currently not supported with TMS products, including iTMS, TMS Enterprise, TMS Web Request, Survey module, and Dispatch module.
Microsoft Windows Internet Explorer 7 is not a supported version in the TMS hardware/software requirements. Four Rivers Software Systems will test Internet Explorer 7 in the very near future and update the TMS hardware/software requirements accordingly.
In order for TMS products to perform optimally, your

Before Calling TMS Technical Support

The **Four Rivers Software Systems Call Center** has compiled a list of suggestions to help speed up the resolution of issues. Please take a couple of minutes to review the sections below before talking to one of our Support Analysts or entering a support request through the **Customer Care Center**. You may need to gather some information in advance.

These are only recommendations and are not required to receive support.

Before You Call

1. Review the ***TMS User Guide*** (in **TMS**, click **Help > TMS Help**).
2. Restart the application.
3. Reboot your workstation.
4. Verify that your organization is not experiencing any technical difficulties.
5. Verify that your workstation and/or server meet the **TMS System Requirements** that can be found on the Customer Care Center under **Product Information**.
6. Review the **Top TMS Support Issues** that can be found on the Customer Care Center under **Support**.
7. Search the **Product Knowledge Base** that can be found on the Customer Care Center under **Support**.
8. Review the **Tutorial Center** that can be found on the Customer Care Center under **Tools**.

When You Call

1. Know your TMS application and database version. This can be found by logging into TMS and clicking on **Help > About TMS**.
2. Know your operating system and service pack version. This can be found by right-clicking on **My Computer** and then selecting **Properties**.
3. Know your **Internet Explorer** browser version. This can be found by launching **Internet Explorer** and clicking on **Help > About Internet Explorer**.
4. Know your **Adobe Acrobat** version.

Please know the answers to these questions

1. Do you have the exact error message on-screen or written down?
2. Does the problem you are experiencing happen on multiple workstations or just one?
3. Does this issue involve the workstation or will we need to contact your Information Systems department to access the server?
4. Is this the first time you have noticed the problem?
5. When did this start happening?
6. Has anything recently changed on your workstation, server, or network?
7. If you recently performed an upgrade, did this happen before the upgrade?
8. Do you have administrative permissions to your workstation?
9. Are you running any Internet security suites such as **McAfee**, **Symantec**, **Norton**, etc.?
10. Are we about to connect to your workstation via **WebEx** if necessary to diagnose the problem? Click here to check.

Miscellaneous items to know

1. Can you send a backup copy of your database via FTP to us?
2. Who can we contact in your Information Systems department if necessary?

Remote Access Connection Policy

Four Rivers Software Systems, Inc. has developed a **Remote Access Connection Policy** to help answer the most common questions of our customers concerning the usage of remote access connections. Please take some time to familiarize yourself with our **Remote Access Connection Policy**. Feel free to contact us if you have any questions.

Remote Access Connection Methods Supported

- Cisco VPN Client
- Microsoft Remote Desktop Connection
- Nortel VPN Client
- PC Anywhere
- Web Based VPN Portals
- WebEx
- Juniper
- Not Supported:
- B2B Connection
- Direct Tunnels between Four Rivers Software Systems, Inc. and any organization
- PC Anywhere (via a dial up connection)

Note: *Please contact the TMS Technical Support department if your organization utilizes another method for remote access connections to see if it will be supported.*

Connection Hours

Remote Access Connection to a customer's system will only be provided during normal business hours, which currently are from 8AM to 5PM EST, and during emergency after-hours support, if available.

What is required for TMS Technical Support to connect to my system?

- One of the above supported connection methods.
- An IS contact to be on the phone when we connect to your server unless we have written consent to access your servers without an IS person present.

- The end user to be on the phone when we connect to an end users' workstation via WebEx.

When will TMS Technical Support connect to my system to resolve a problem?

- To help troubleshoot a system down support issue.
- To help troubleshoot an installation or upgrade issue that cannot be resolved over the phone.
- To help troubleshoot a data related support issue.
- To help troubleshoot any other type of support issue where the Support Analyst determines a remote access connection is necessary.

Note: *The use of a remote access connection is made at the sole discretion of the TMS Technical Support Department.*

When will TMS Technical Support not connect to my system to resolve a problem?

TMS Technical Support will provide directions on how to accomplish the task that needs completed on the server, however, we will also ask that you contact your TMS Administrator or IS Contact to complete the task.

- To restart a TMS product after a server reboot such as: TMS AutoPrint, TMS Pager, TMS HIS Links, or any other TMS Interface.
- To backup or restore a TMS database.
- To verify the data source of a TMS report.
- To upload, download, or replace a TMS report.
- To assist in troubleshooting any hardware issues.
- To install or upgrade the TMS software unless purchased separately.
- To assist in the troubleshooting of any issues other than the TMS software.

Note: *The use of a remote access connection is made at the sole discretion of the TMS Technical Support Department.*

Documentation Feedback

At Four Rivers, we strive to produce the highest quality documentation. We like to hear from our users about what they would like to see in FRSoft documentation. Please send email to FRSoft technical communications at **Documentation_feedback@frsoft.com**.
Please include the following information with your feedback:

- Manual name and version number (found on the title page)
- Topic title and page number
- Brief description of problem (for example, where did you follow step-by-step instructions that are inaccurate, did you find spelling or grammatical errors in a paragraph, is there something you would like to have clarified, etc.)
- Your suggestion on how to correct or improve the document

Please keep in mind that the email address **Documentation_feedback@frsoft.com** is only for documentation feedback. If you have a technical question, please contact TMS Technical.

*Thank you for selecting the **medTester Sync Utility** from Four Rivers Software Systems!*